

WHAT IS CLAIMED IS:

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A1
1. A computer-readable medium having computer-executable instructions, comprising,
receiving input of a value corresponding to a first field of a plan element;
receiving additional input corresponding to a second field of a plan element, the input defining the second field as having a value based on the first field; and
developing a plan by running a simulation on plan elements including the first and second fields.

2. The computer-readable medium of claim 1 having further computer-executable instructions for receiving input of a new value for the first field, and developing a new plan by running a simulation on plan elements including the first and second fields wherein the new value changes the information in the second field.

(c) 3. The computer-readable medium of claim 1 wherein the plan is a financial plan and wherein the first field represents a date.

4. The computer-readable medium of claim 3 wherein the second field represents a date based on the first field.

5. The computer-readable medium of claim 1 wherein the plan is a financial plan and wherein the first field represents an amount.

6. The computer-readable medium of claim 5 wherein the second field represents a date conditional on the amount represented in the first field.

7. The computer-readable medium of claim 1 wherein the plan is a financial plan and wherein the first field represents a rate.

8. The computer-readable medium of claim 7 wherein the second field represents a date conditional on the rate represented in the first field.

9. The computer-readable medium of claim 1 having further computer-executable instructions for receiving input corresponding to an adjustment value related to the second field.

10. The computer-readable medium of claim 1 wherein the elements are objects, and having further computer-executable instructions for arranging the objects in a hierarchy.

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11. The computer-readable medium of claim 10 having further computer-executable instructions for associating a plurality of objects in a package object.

12. The computer-readable medium of claim 1 having further computer-executable instructions for disabling at least one plan element.

13. The computer-readable medium of claim 12 having further computer-executable instructions for enabling at least one plan element.

rev 14 14. The computer-readable medium of claim 13 wherein developing a plan by running a simulation includes arranging a list of plan elements that includes enabled elements and excludes disabled elements.

15 15. The computer-readable medium of claim 13 wherein developing a plan by running a simulation includes removing expired elements from the list.

a) 16 15. The computer-readable medium of claim 1 wherein receiving input information includes providing a user interface.

17 16. The computer-readable medium of claim 1 wherein receiving input information includes synchronizing plan elements with data from another program.

Sub Q4 18 17. In a computer system, a method of organizing information related to a plan, comprising, providing access to a limited number of objects to a user, each object having fields therein for maintaining plan information, receiving first user input information including a value associated with a first field of a first object, and receiving second user input information associated with a second field of a second object, the second input information specifying a relationship of the second field with the first field.

19 18. The method of claim 17 wherein providing access to a limited number of objects to a user includes providing a user interface.

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20 19. The method of claim 17 further comprising running a simulation-based on the plan objects.

21 20. A system for outputting a plan, comprising, a user interface for presenting a limited number of plan objects to a user and for receiving data for a first field of a plan object and data for a second field of a plan object, the data of the second field having a value linked to the data of the first field, and a planner engine for developing a plan by running a simulation on plan objects including the first and second fields.

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22 21. The system of claim 20 wherein the objects are arranged in a hierarchy.

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c1 / 23 22. The system of claim 20 wherein the first field represents a date.

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24 23. The system of claim 20 wherein the first field represents an amount.

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25 24. The system of claim 23 wherein the second field represents a date conditional on the amount represented in the first field.

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c1 > 26 25. The system of claim 20 wherein the plan is a financial plan and wherein the first field represents a rate.

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17 26. The system of claim 25 wherein the second field represents a date conditional on the rate represented in the first field.

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28 27. The system of claim 20 wherein at least one of the fields includes an adjustment value.

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29 28. The system of claim 20 wherein at least one field includes a mechanism for indicating to the planner engine that said field is disabled.

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30. The system of claim 20 wherein at least one object includes a mechanism for indicating to the planner engine that said object is disabled.

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c1 > 31. The system of claim 20 wherein at least one field includes a mechanism for indicating to the planner engine that said field is enabled.

c1 >

32. The system of claim ²¹~~20~~ wherein at least one object includes a mechanism for indicating to the planner engine that said object is enabled.

33. The system of claim 20 further comprising a mechanism for synchronizing plan objects with data from another program.

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